

# Michigan Treasury Online (MTO) Optimization

## Learning Series 2: Creating a Profile and Establishing a Business Relationship

***NOTE: These documents are for demonstration purposes only and are not actual accounts or taxpayers.***

January 2016

Customer Friendly







Simplified Process

### What's New in MTO?

- How to Log-in
- How to Create a User Profile
- How to Edit a User Profile
- How to Retrieve a Username
- How to Reset a Password
- How to Add a Business to an MTO User's Account


### ***Learning Series 2: Creating a Profile and Establishing a Business Relationship.***

Before continuing, please spend a few minutes becoming familiar with the images used in this Learning Series:

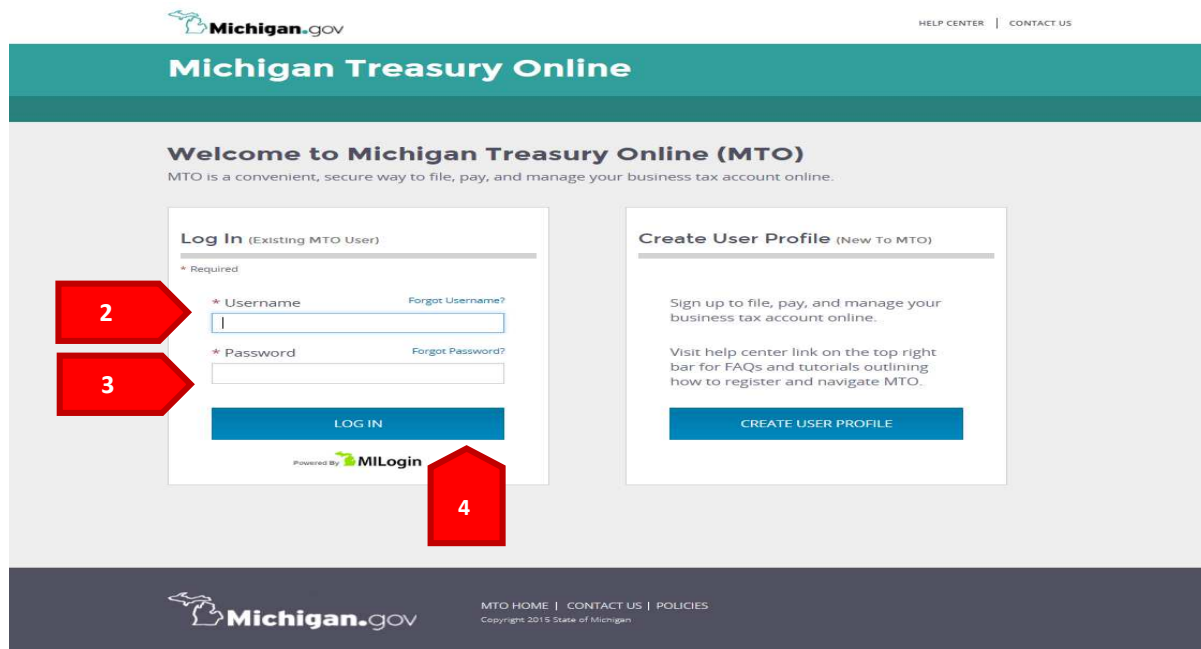
Image	Purpose
	To indicate a change in process or functionally that is expected to significantly increase the user experience
	To indicate a reminder or a relevant note within a text
	To indicate a quick tip or faster way of completing an action
	To number steps on screenshots
	To highlight any part of the screenshot, such as a button
	To draw attention to a relevant section of information/text (not a button)

In January 2016, **Michigan Business One Stop (MBOS) is going away!** Michigan Treasury Online (MTO) will no longer be tied to MBOS and will be a stand-alone website.

## Log-In to MTO

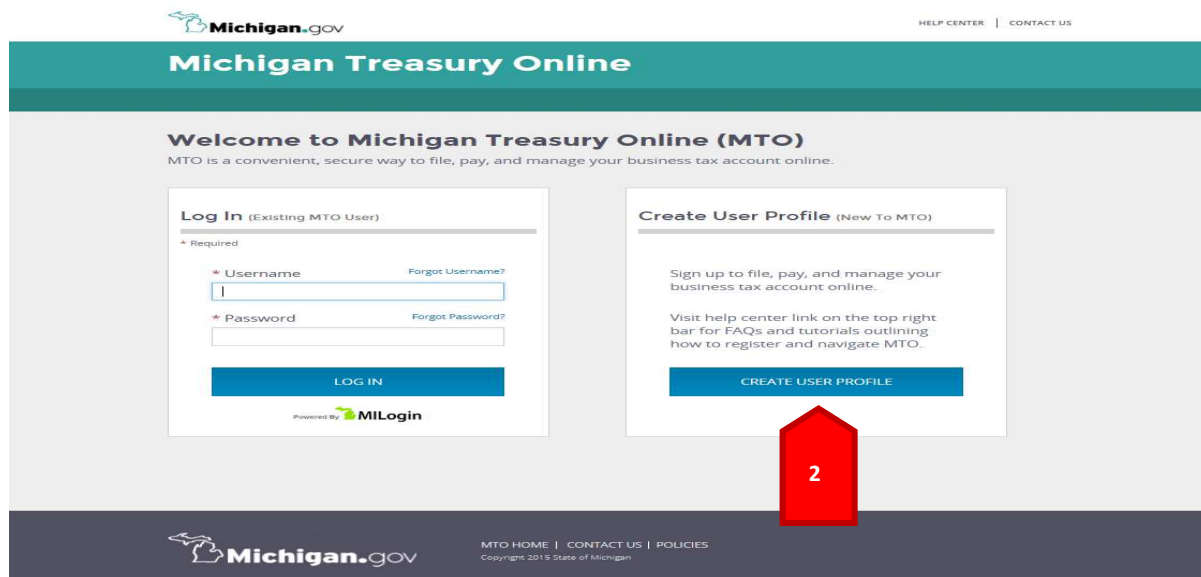
 **Note:** Existing MTO users are able to log-in with their previously established username and password. New MTO users must first create a new user profile before they can log into MTO.

1. If you are a current MTO user, access MTO using: <https://mto.treasury.michigan.gov>
2. Enter your current **Username**.
3. Enter your current **Password**.
4. Select **LOG IN**.



## Create a User Profile

1. To access MTO, use: <https://mto.treasury.michigan.gov>
2. Select **CREATE USER PROFILE**.




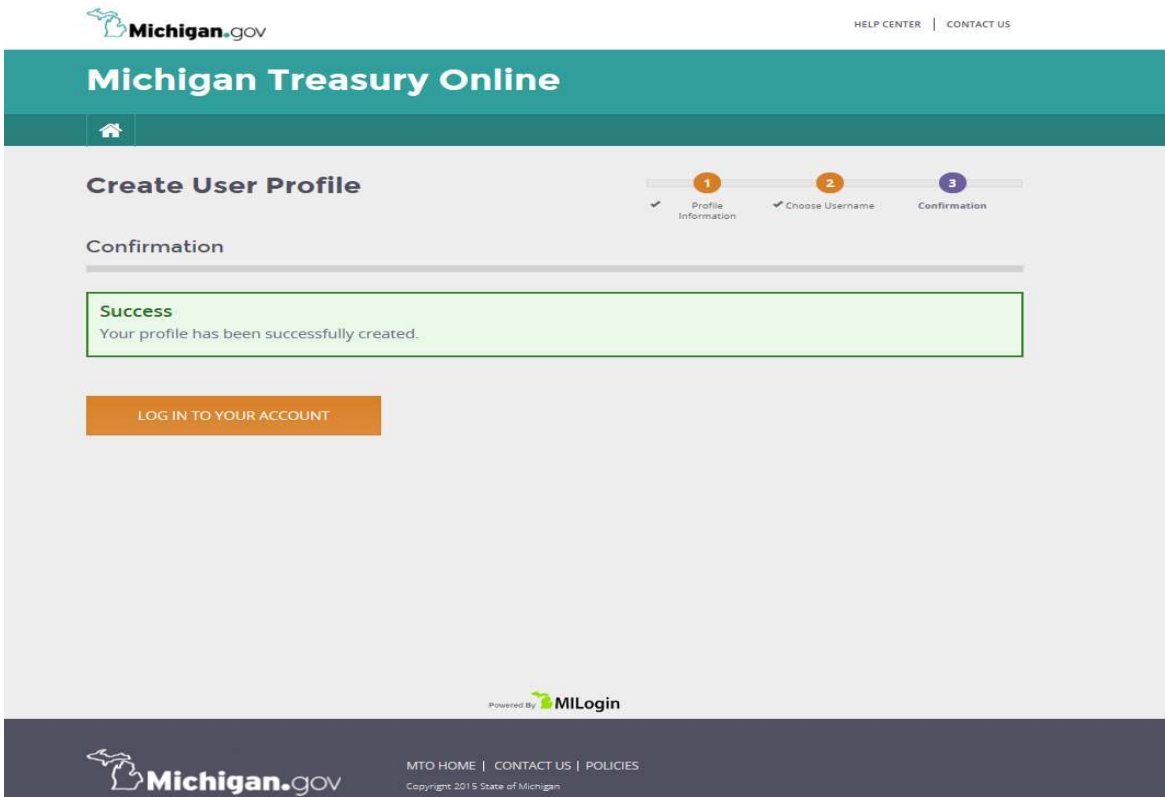
3. Enter required **Profile Information** including answering the **Verification Question** and agreeing to the **terms & conditions**.
4. Select the **Next** button.

The screenshot shows the 'Create User Profile' page on the Michigan Treasury Online website. The page has a teal header with the Michigan.gov logo and navigation links. A progress bar at the top indicates three steps: 1. Profile Information (active), 2. Choose Username, and 3. Confirmation. The main section is titled 'Profile Information' and contains several required fields: First Name, Middle Initial, Last Name, Suffix, Email Address, Confirm Email Address, Phone Number, Mobile Number, and a Verification Question. There are two blue informational boxes: one for email-based password resets and one for mobile-based password resets. At the bottom, there is a checkbox for 'I agree to the terms & conditions.' and two buttons: 'NEXT' (orange) and 'BACK' (dark grey). A red arrow with the number '3' points to the 'NEXT' button.

5. Choose a **Username** using the established Username guidelines.
6. Choose a **Password** using the established Password guidelines.
7. Confirm your **Password**.
8. Select **Submit**.

The screenshot shows the 'Create User Profile' page on the Michigan Treasury Online website, specifically the 'Choose Username' step. The progress bar at the top shows three steps: 1. Profile Information (completed), 2. Choose Username (active), and 3. Confirmation. The main section is titled 'Choose Username' and contains three required fields: Username, Password, and Confirm Password. A large blue box on the right contains 'Username guideline' and 'Password guidelines'. The 'Username guideline' states: 'Enter your last name, first initial, and any 4 numbers with no space between them. For Example: John Smith and using 9999 as an example for the four digit number, you would enter smithy9999.' The 'Password guidelines' list: 'Must be at least 8 characters in length', 'Must include characters from 3 of the following categories: Upper case letters (A-Z), Lower case letters (a-z), Numbers (0-9), and Special characters (!\$#,%~^&\*~+=><)', and 'Should not be based on your Username'. At the bottom, there are 'SUBMIT' (orange) and 'BACK' (dark grey) buttons. A red arrow with the number '8' points to the 'SUBMIT' button.

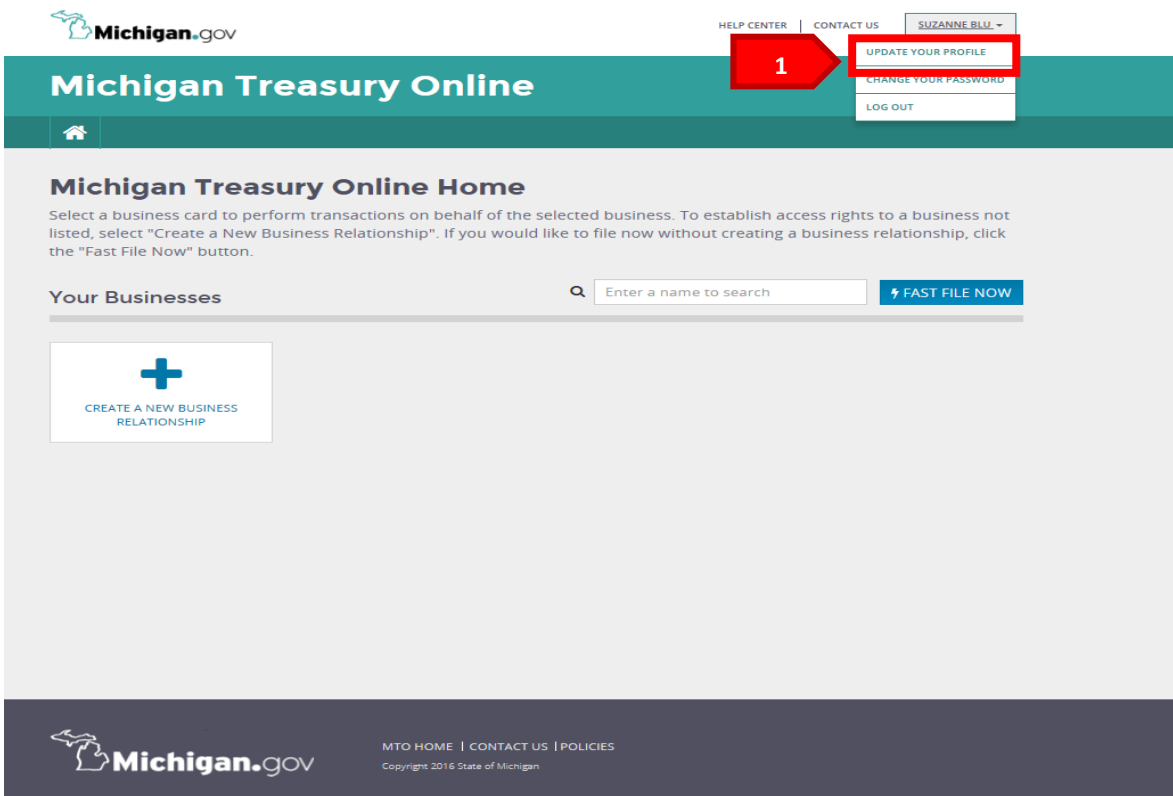
 **Note:** You will receive a confirmation notice once your profile is successfully created, and you will have the option to log-in to your account.



The screenshot shows the 'Create User Profile' confirmation page on the Michigan Treasury Online website. At the top, there's a teal header with the Michigan.gov logo and 'Michigan Treasury Online' text. Below the header, a progress bar indicates three steps: 1. Profile Information (checked), 2. Choose Username (checked), and 3. Confirmation (active). The main content area is titled 'Confirmation' and features a green success message: 'Success Your profile has been successfully created.' Below this is an orange button labeled 'LOG IN TO YOUR ACCOUNT'. At the bottom, it says 'Powered By MILogin'.

## Edit a User Profile

1. Select **UPDATE USER PROFILE** from the drop-down menu under your name in the top right-hand corner of the screen.



The screenshot shows the 'Michigan Treasury Online Home' page. The top teal header includes the Michigan.gov logo, 'Michigan Treasury Online', and a user profile dropdown menu for 'SUZANNE BLU'. A red arrow labeled '1' points to the 'UPDATE YOUR PROFILE' option in the dropdown. Below the header, the page title is 'Michigan Treasury Online Home', followed by a brief instruction on selecting a business card. There's a search bar labeled 'Your Businesses' with a 'FAST FILE NOW' button. A large blue plus icon is visible, with the text 'CREATE A NEW BUSINESS RELATIONSHIP' below it. The footer contains the Michigan.gov logo, 'MTO HOME | CONTACT US | POLICIES', and 'Copyright 2016 State of Michigan'.

2. Update necessary **Profile Information**.
3. Select **Submit**.

## Michigan Treasury Online



### Update Profile

Update your profile information.

1

Profile Information

2

Confirmation

#### Profile Information

\* Required

\* First Name

Suzanne

Middle Initial

\* Last Name

Blu

Suffix

\* Email Address

bluj1234@yahoo.com

\* Confirm Email Address

bluj1234@yahoo.com

To reset the forgotten password, you can receive a temporary personal identification number (PIN) to above email address.

\* Phone Number

517-555-1212

Mobile Number

To reset the forgotten password, you can choose to receive a temporary PIN on your mobile device as a text.

3

SUBMIT

CANCEL ✕

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**Note:** You will receive a confirmation notice that your profile has been successfully updated.

## Michigan Treasury Online



### Update Profile

1

✓ Profile Information

2

Confirmation

#### Confirmation

##### Success

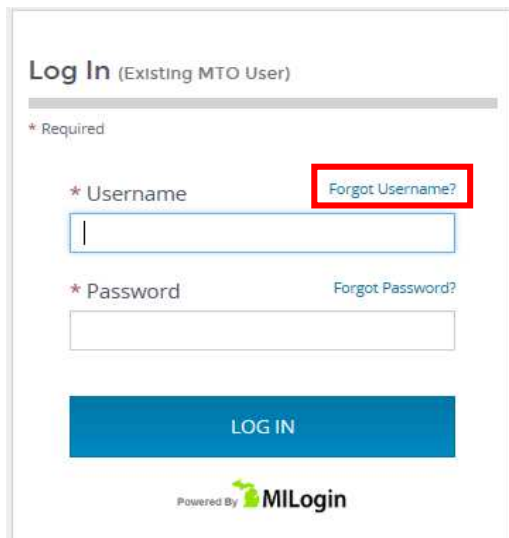
Your profile has been successfully updated.

RETURN TO HOME PAGE

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## Retrieve a Username

### 1. Select **Forgot Username?**




Log In (Existing MTO User)

\* Required

\* Username [Forgot Username?](#)

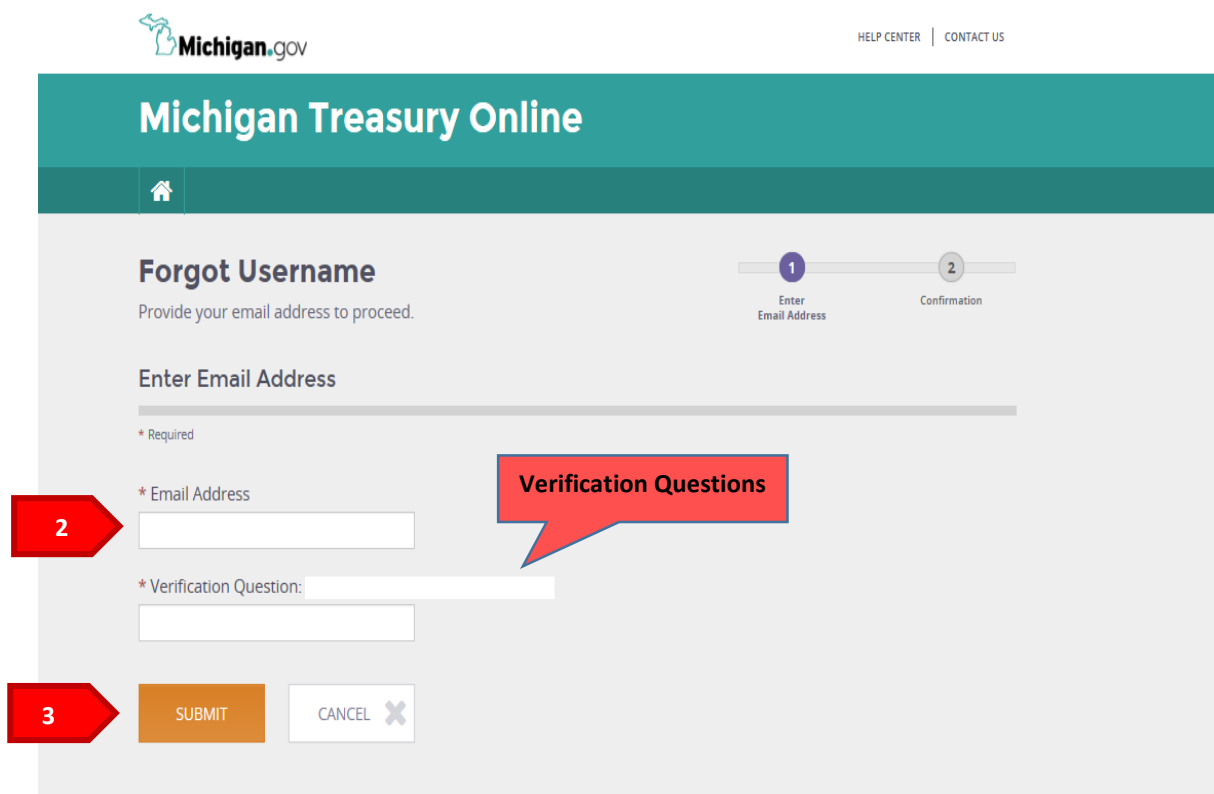
\* Password [Forgot Password?](#)


LOG IN

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 **Note:** For security reasons, **Verification Questions** presented on the screen below will not be shown in the Learning Series.

2. Enter your **Email Address** and answer the **Verification** question(s).
3. Select the **Submit** button. Selecting the *Cancel* button returns you to the MTO log-in screen.



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## Michigan Treasury Online



### Forgot Username

Provide your email address to proceed.

1 Enter Email Address 2 Confirmation

#### Enter Email Address

\* Required


\* Email Address

\* Verification Question:

**2**

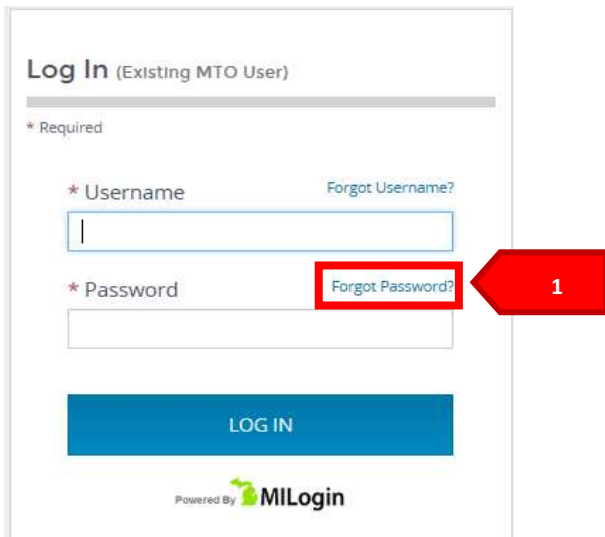
**Verification Questions**

**3** SUBMIT CANCEL X

 **Note:** At this point, your username has been sent to the email address listed in your user profile.

## Reset Password

1. Select **Forgot Password?**



Log In (Existing MTO User)

\* Required

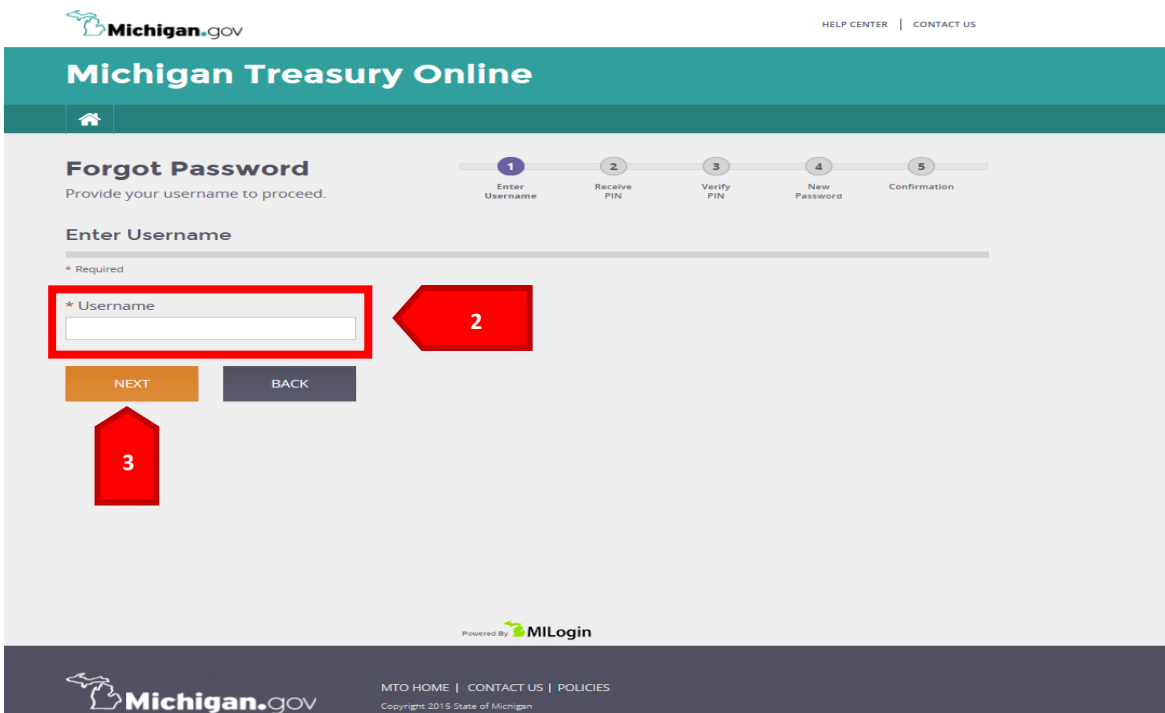
\* Username [Forgot Username?](#)

\* Password [Forgot Password?](#)

LOG IN

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2. Enter your **Username**
3. Select **Next**



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## Michigan Treasury Online

Forgot Password

Provide your username to proceed.

Enter Username

\* Required

\* Username

NEXT BACK

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**Note:** Selecting the **Back** button takes you to the log in screen.

4. Select the **Email** or **Mobile** button depending on how you wish to receive a Personal Identification Number to reset your password. Mobile number will not display if you did not provide a mobile number when setting up your MTO User Profile.
5. Select **Next**.

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## Michigan Treasury Online

**Forgot Password**

To verify your identity, please choose one option from the option(s) listed below.

1 Enter Username 2 Receive PIN 3 Verify PIN 4 New Password 5 Confirmation

**Receive Personal Identification Number (PIN)**

\* Required


4 ☒ **Email** You will receive a PIN via an e-mail on your e-mail id 'b\*\*\*\*\*@yahoo.com'

5

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 **Note:** If a user selects **Email**, a confirmation is emailed to the email address on file (image of email below). If a user selects **Mobile**, a confirmation is sent to the cellular number on file.

Reply Reply All Forward IM



Tue 11/3/2015 4:13 PM

DONOTREPLY-MILogin@michigan.gov

Regarding your Michigan Treasury Online Account

To

Hello,

Pursuant to your request, please use the following personal identification number(PIN) to reset your forgotten password.

595915409

**Note:** This PIN will expire in 5 minutes.

If you are facing any issues, please contact the Client Service Center at 517-241-9700 or 1-800-968-2644 for further assistance.

Thanks,  
MILogin Team




6. Check your email or mobile to view the Personal Identification Number (PIN) sent to you

- Enter the PIN that was sent to you
- This PIN can be copied and pasted into the PIN field in MTO




**Note:** The PIN expires within 5 minutes after it is delivered to your email.

7. Select **Next**.

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# Michigan Treasury Online



## Forgot Password

Please enter the PIN to validate your identity.

1

2

3

4

5

✓ Enter Username

✓ Receive PIN

Verify PIN

New Password

Confirmation

### Verify Personal Identification Number (PIN)

\* Required

\* Personal Identification Number (PIN)

6

595915409


x


If you did not receive your PIN or if you want to choose a different method, click BACK button.

7

NEXT

BACK

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8. Enter your new **Password** using the established Password guidelines.
9. Confirm your **Password**.
10. Select **Submit**.

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## Michigan Treasury Online

**Forgot Password**  
Enter your new password.

1 Enter Username 2 Receive PIN 3 Verify PIN 4 New Password 5 Confirmation

**New Password**

\* Required

\* Enter New Password

\* Confirm New Password

**8**

**9**


**10** SUBMIT CANCEL


**Password guidelines:**

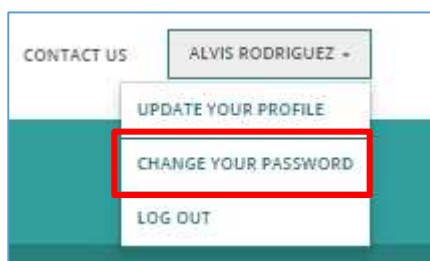
- ✓ Must be at least 8 characters in length
- ✓ Must include characters from 3 of the following categories:
  - Upper case letters (A-Z)
  - Lower case letters (a-z)
  - Numbers (0-9)
  - Special characters (!\$#%&\*\_+<=>~)
- ✓ Should not be one of the last 3 used passwords
- ✓ Should not be based on your Username

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 **Note:** You will receive a screen notification that your password has been successfully reset.

 Another way to change your password: Select the **CHANGE YOUR PASSWORD** option from the drop-down under your name in the top right-hand corner of the screen and follow the prompts.



## Establishing a Relationship with a Business:

Old Process	New Process (Effective January 2016)
<ul style="list-style-type: none"><li>Only the business owner can enter into MBOS and give/delegate account access to a 3<sup>rd</sup> party user (such as a CPA, an Association member, etc.)</li><li>As part of the delegation process, the user seeking access can wait several days to receive a PIN in the mail</li></ul>	<ul style="list-style-type: none"><li>A 3<sup>rd</sup> party user (<i>with the business' permission</i>) can establish a relationship (or self-delegate) to a business</li><li>The delegation process requires less steps due to enhanced shared secret authentication and elimination of sending the one-time access code via paper mail</li></ul>

There is a simplified process for establishing a relationship to a business. ***The first time a user establishes their (first) relationship to a business, the user is emailed a one-time access code.*** Going forward, the user will not have to enter an access code if and when establishing a relationship to another business. Anytime a user establishes a relationship to a business, a **User Role** must be selected.


There are three types of User Roles:

1. **Manage Business Account Information**
2. **File and Pay Only**
3. **Fast File Now**


Each time a user creates a **New Business Relationship**, he/she will be able to select a **User Role**.



*Users must have the FEIN of the business they are establishing a relationship to.*

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### Michigan Treasury Online





#### Michigan Treasury Online Home

Select a business card to perform transactions on behalf of the selected business. To establish access rights to a business not listed, select "Create a New Business Relationship". If you would like to file now without creating a business relationship, click the "Fast File Now" button.

Your Businesses

FAST FILE NOW

  
CREATE A NEW BUSINESS  
RELATIONSHIP

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## User Roles:

In the new MTO application, Sales, Use, and Withholding (SUW) taxpayers have three user roles to select from when establishing a relationship to a business:

- **Manage Business Account Information-** full manage rights that include Registration functions and File and Pay SUW tax return functions. This role allows a user to add and update registration information along with the ability to file, pay, amend, view and print current and previously filed SUW returns.
- **File and Pay Sales, Use and Withholding Taxes Only-** This role allows a user to file, pay, amend, print and view current and previously filed SUW tax returns.

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### Michigan Treasury Online

**Verify Business Relationship**

Fill in all of the information below to verify a business relationship.

**Filing Information**

\* Required

\* What tasks will you perform for the business?

☐ Manage Business Account Information

☐ File and Pay Sales, Use and Withholding Taxes Only

NEXT BACK CANCEL

If a user selects **Manage Business Account Information** or **File and Pay Sales, Use and Withholding Taxes only**, he/she will be prompted to answer security questions to authenticate the business.

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### Michigan Treasury Online

**Verify Business Relationship**


Fill in all of the information below to verify a business relationship.

**Security Questions**

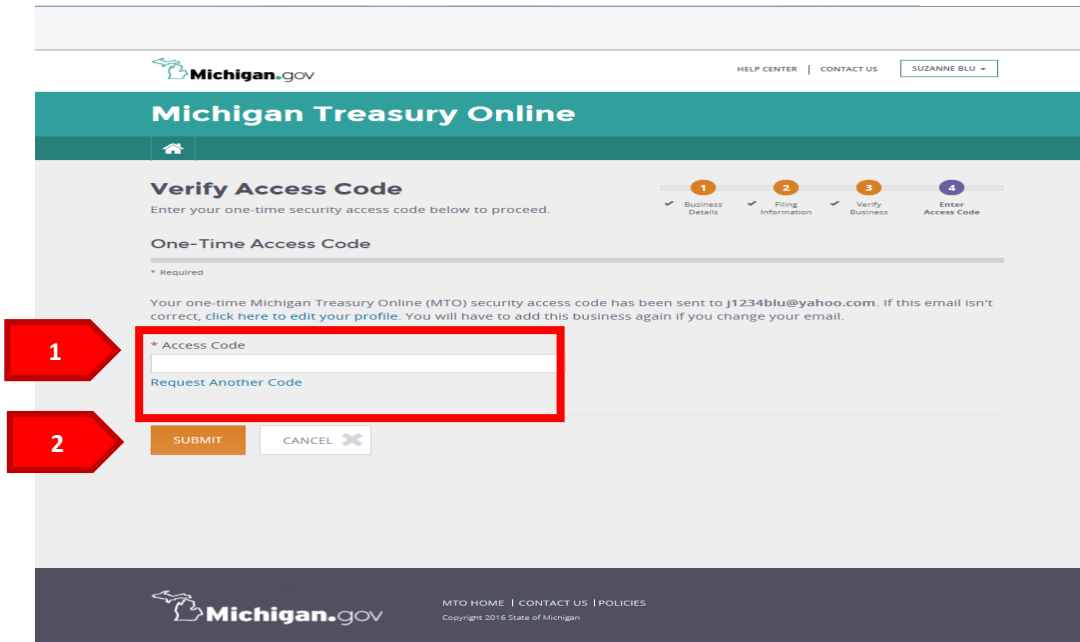
Answer all of the following questions.

\* Required

Security questions are hidden for authentication purposes

 **Note:** The first time a user adds the initial (first) business account to his/her profile, the user is emailed an access code, which they will enter into the **Access Code** filed.

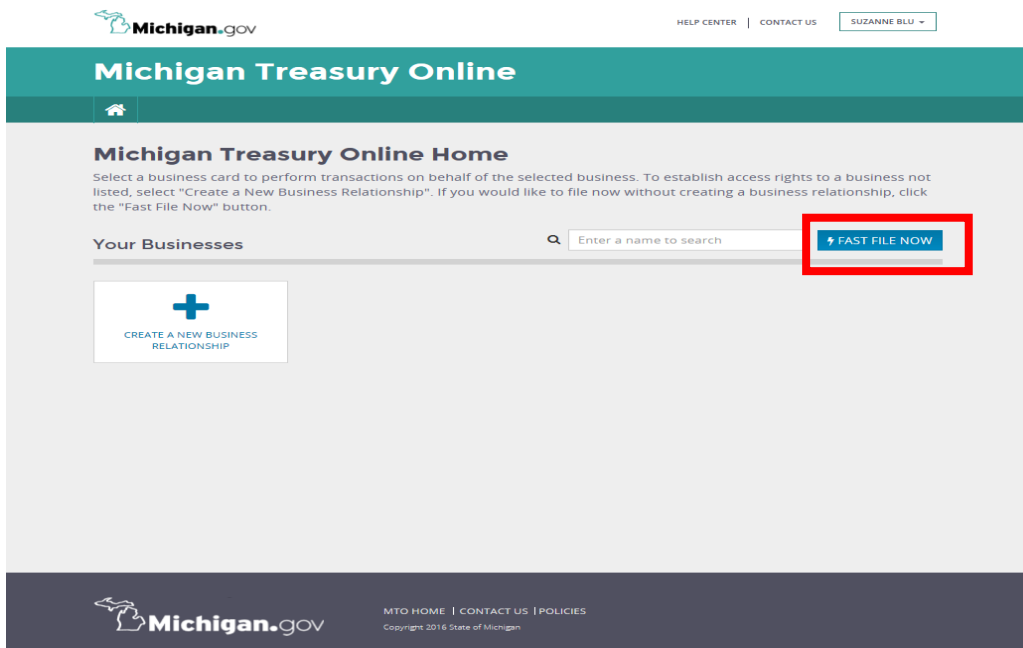
1. Enter the **Access Code**
2. Select **Submit**



Once a user enters the new correct **Access Code**, the user can view and access the profile of the newly added business.

**Fast File Now** is the third user role. A business relationship is not established therefore shared secret questions are not answered and an access code is not received when a user elects to use Fast File Now.

- **Fast File Now-** a guest access where no business relationship is established. With Fast File Now, there are limited capabilities; the user is restricted to simply filing and paying a Sales, Use and Withholding tax return. The user is not able to amend, view or print returns.



See **Learning Series 3** for additional detailed instructions and information on the three types of user roles/access types.



## Contact Us

If you have additional questions that were not answered using this Learning Series, please call the Michigan Department of Treasury at 517-636-6925.

The MTO Business website is currently being revised to include updated information on MTO and the changes to SUW that will begin in January. The website can be accessed here: [www.michigan.gov/mtobusiness](http://www.michigan.gov/mtobusiness).